CHARGE Anywhere®
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CHARGE Anywhere

V^{X} 610 POS Terminal

User's Manual

v1.0

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1 PURPOSE

This User's Guide describes the full functionality of CHARGE Anywhere® on the V^X 610 unit.

2 SCOPE

This guide applies to all customers of CHARGE Anywhere who need to use the CHARGE Anywhere application on the V^X 610 unit.

3 DEFINITIONS

3.1 Quick Sale

Quick Sale is the most common type of transaction. It is used to transact a sale immediately upon swiping a card. Quick Sale is the default mode when the device is powered on.

3.2 Sale

A Sale is transacted by swiping a card or by manually entering the card information and submitting it for authorization.

3.3 Auth Only

An Auth Only is used to obtain pre authorization for a sale from the credit card company. This type of transaction can only be done in the online mode.

3.4 Force

A Force takes place when a transaction that has previously been authorized is converted (forced) to an actual sale. If a force is done while offline, it is stored in an offline log to be submitted at a later time

3.5 Void

A transaction that has been submitted in error may be cancelled using the Void function. A transaction may only be voided on the same day that it was conducted.

3.6 Retry

A submitted transaction, that receives an invalid response, may be retried from the transaction log.

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3.7 Return

A Return may be conducted when a customer requests a refund after the date of purchase. It may be done while online or offline. When a return is conducted offline, it is stored in an offline log to be submitted at a later time.

3.8 Debit

A Debit transaction is performed when a card is swiped and the customer must then enter in their PIN in order for the transaction to be authorized.

NOTE: ALL IMAGES REPRESENTED IN THIS DOCUMENT MAY HAVE CHANGED SINCE THIS DOCUMENT WAS RELEASED. THE FUNCTION OF CHARGE ANYWHERE REMAINS VERY CLOSE TO THE STEPS DESCRIBED IN THIS USER GUIDE.

4 GETTING STARTED

In order to start using CHARGE Anywhere, turn the V^X 610 on by pressing the green button. The CHARGE Anywhere application must be selected by pressing F3.

4.1 Start Up

4.1.1 Enter the Password. To enter letters, press the appropriate number key then press the Alpha button above the number 2 to scroll through the available letters.

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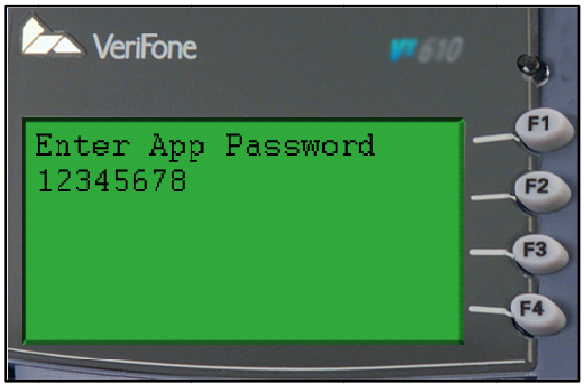

NOTE: The default password is *12345678.* This password must be changed immediately to maintain security. To change passwords see section *9.4 Password Options.* A screen will appear with the status of all software passwords. Press any key to move past this screen.

4.1.2 Press enter. You are ready to start using CHARGE Anywhere. The device screen will display the CHARGE Anywhere main menu.

4.2 Types of Credit Cards

The credit cards supported are:

- Visa
- MasterCard
- American Express
- Discover
- Diners Club
- JCB

5 CONDUCTING TRANSACTIONS

The CHARGE Anywhere application allows you to conduct many types of transactions. Supported transactions are as follows:

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5.1 Process a Quick Sale

5.1.1 When the application is initialized, Quick Sale is the default mode.
5.1.2 Swipe the card, through the card reader, with the magnetic stripe facing in.
5.1.3 Enter Sale Amount and press Enter.
5.1.4 Verify card information and transaction amount.
5.1.5 Press F3 to Submit.
5.1.6 The transaction will be submitted and a response will display.
5.1.7 A merchant receipt will print. Press F3 to print a customer receipt.

5.2 Sale

5.2.1 Press F2 for Transactions.
5.2.2 Press F1 for Sale.
5.2.3

Swipe	**Manual**
Swipe the card through the card reader, with the magnetic strip facing in.	Enter card#. Enter Exp Date. Press F3 or F4 for Card Present. Enter Address, Zip Code and CVV.

5.2.4 Enter the Sale Amount and/or Tax Amount (if applicable).
5.2.5 Press Enter.
5.2.6 Verify card information and transaction amount. Press F3 to Submit.
5.2.6 The transaction will be submitted and a response and approval code will display.
5.2.7 A merchant receipt will print.

5.3 Auth Only

5.3.1 Press F2 for Transactions.
5.3.2 Press F3 for Auth Only.
5.3.3

Swipe	**Manual**
Swipe the card through the card reader, with the magnetic strip facing in.	Enter card#. Enter Exp Date. Press 1 or 2 for Card Present. Enter Address, Zip Code and CVV.

5.3.4 Enter Authorization Amount.
5.3.5 Verify card information and transaction amount.
5.3.6 Press F3 to Submit.
5.3.7 The transaction will be submitted and a response and approval code will display.
5.3.8 A merchant receipt will print.

5.4 Submitting an Auth Only for Payment

5.4.1 Press F4 for Logs.
5.4.2 Press F4 for Auth Only Transaction Log.
5.4.3 Select the transaction and by pressing the corresponding F key.
NOTE: Details of the transaction will display.

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5.4.4 Press F4 to Capture Payment.
5.4.5 The transaction will be submitted and a response and approval code will display.
5.4.6 A merchant receipt will print.

5.5 Return

5.5.1 Press F2 for Transactions.
5.5.2 Press down to view Return, then press F2.

5.5.3

Swipe	**Manual**
Swipe the card through the card reader, with the magnetic strip facing in.	Enter card#. Enter Exp Date. Press 1 or 2 for Card Present. Enter Address, Zip Code and CVV.

5.5.4 Enter Return Amount.
5.5.5 Press F3.
5.5.6 The transaction will be submitted and a response and approval code will display.
5.5.7 The signature receipt will print automatically.

5.6 Retry

5.6.1 Press F4 for Logs.
5.6.2 Press F1 for Current Day Log.
5.6.3 Select the transaction.
NOTE: Details of the transaction will display
5.6.4 Press F5 for Menu.
5.6.5 Press F4 for Retry.
5.6.6 The signature receipt will print automatically.

5.7 Force

5.7.1 Press F2 for Transactions.
5.7.2 Press F4 for Force.
5.7.3

Swipe	**Manual**
Swipe the card through the card reader, with the magnetic strip facing in.	Enter card#. Enter Exp Date. Press 1 or 2 for Card Present. Enter Address, Zip Code and CVV.

5.7.4 Enter Approval Code.
5.7.5 Enter Force Amount.
5.7.6 Verify card information and transaction amount.
5.7.7 Press the F3 to Submit.
5.7.8 The signature receipt will print automatically.

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5.8 Void

Voids can be conducted from the Transactions menu or from the Logs menu.

	Transactions	**Logs**
5.8.1	Press down and F1 for Void.	Press F4 for Logs.
5.8.2	Enter Trans # and Press Enter.	Press F1 for Current Day Log.
5.8.3	Verify Card Information and transaction amount.	Select the desired transaction.
5.8.4	Press F3 to Void.	Details of the transaction will display.
5.8.5	The signature receipt will print.	Press F3 for Void.
5.8.6	Press F3 for a customer receipt.	Press F3 to Confirm.

5.9 Offline Transactions

5.9.1 Switch offline mode to on.

5.9.1.1 Go to Setup by pressing down and F1.
5.9.1.2 Press down, press F4 for offline.
5.9.1.3 Press F3 to turn on offline mode.
5.9.1.4 Press the Red button to return to the main menu.

5.9.2 Run an offline transaction.

5.9.2.1 Select transaction type and process transaction as described in sections above.
5.9.2.2 Instead of receiving an approval code, the transaction will be stored in the terminal to be sent when a wireless signal is regained.

5.9.3 Turn off offline mode.

5.9.3.1 Go to Setup by pressing down and F1.
5.9.3.2 Press down, press F4 for offline.
5.9.3.3 Press F4 to turn off offline mode.
5.9.3.4 Press the Red button to return to the main menu.

5.9.4 Process a single offline transaction.

5.9.4.1 Press F4 for Logs.
5.9.4.2 Press F3 for Offline Transactions.
5.9.4.3 Press F1 to view transactions.
5.9.4.4 Select the desired transaction.
5.9.4.5 Press F3 to Send.

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5.9.5 Process multiple offline transactions.

5.9.5.1 Press F4 for Logs.
5.9.5.2 Press F3 for Offline Transactions.
5.9.5.3 Press F2 to Send All Transactions.

5.9.6 Process failed offline transactions.

5.9.6.1 Press F4 for Logs.
5.9.6.2 Press F3 for Failed Offline Transactions.
5.9.6.3 Press F4 to Send All Transactions.

5.10 Debit

5.10.1 Press F2 for Transactions.
5.10.2 Press F2 for Debit.
5.10.3 Select if the transaction will be a return or sale.
5.10.4 Swipe the card.
5.10.5 Have the cardholder enter a PIN. Enter the sale amount.
5.10.6 Enter the sale amount.
5.10.7 Verify the transaction information and Press F3.
5.10.8 The transaction will be submitted and a response and approval code will display.
5.10.9 A merchant receipt will print.

6 REPORTS

6.1 Totals

6.1.1 Card Type Totals

This shows the totals from selected card types. To view the Totals;

6.1.1.1 Press F3 for Reports.
6.1.1.2 Press F1 for Totals.
6.1.1.3 Press F1 for Card Type.
6.1.1.4 Select a card:

- Visa
- MasterCard
- Amex
- Discover
- Diners Club
- JCB

Totals of Transactions, Sales, Returns, Sale Total, Return Total and Net Total will display for the selected card. These totals can be printed.

6.1.2 Grand Totals

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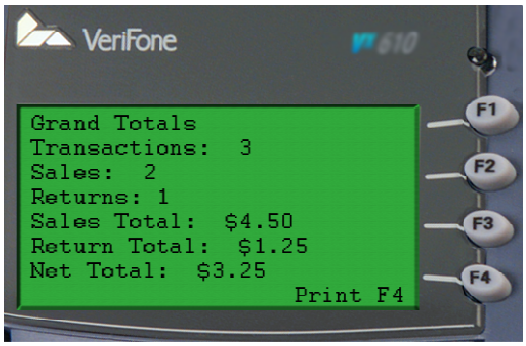
The Grand Totals for all card types will display. This report can be printed.



6.1.3 Clerk Number Totals

Enter the Clerk Number in the window and press enter. The details associated with the specified clerk will display. This report can be printed.

6.2 Detail

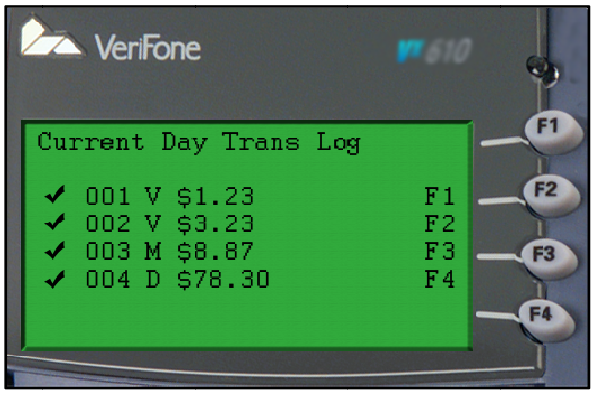
Full Details

The full details of transactions will be printed including:

- Transaction ID
- Date and time of transaction
- Amount of Sale
- Truncated Card Number and expiration date

7 LOGS

7.1 Current Day Logs



7.2 Archives

The application converts all transactions of a previous day into an archived log. Logs for all transactions are saved for a period of three days. To access archived Logs:

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7.2.1 Press F4 for Logs.
7.2.2 Press F2 for Archives.
7.2.3 For Archives 1, 2, or 3, press the corresponding F1, F2, or F3.
NOTE: The transactions from the previous day will be stored in the Log Viewer. The viewer will display the Status, Transaction ID, Type of Transaction and the Total Amount of the transaction.
7.2.4 To View a particular transaction, press the corresponding number. The details of the transaction will display.
7.2.5 To Rotate Logs see section (11.1 Rotate Logs).

7.3 Viewing Offline Transactions

7.3.1 Press F4 for Logs.
7.3.2 Press F3 for Offline Transactions.
7.3.3 Press number to View Transaction.

7.4 Sending an Offline Transaction

7.4.1 Press F4 for Logs.
7.4.2 Press F3 for Offline Transactions.
7.4.3 Press F1 then the desired transaction number. The details of the transaction will display.
7.4.4 Press F3 to Send.

7.5 Sending All Offline Transactions

7.5.1 Press F4 for Logs.
7.5.2 Press F3 for Offline Transactions.
7.5.3 Press F2 to Send All Transactions.

7.6 Failed Offline Transactions

7.6.1 Press F4 for Logs.
7.6.2 Press F3 for Failed Offline Transactions.
7.6.3 Press F4 to Send All Transactions.

7.7 Auth Only Transactions

7.7.1 Press F4 for Logs.
7.7.2 Press F4 for Auth Only Transactions.

8 SETUP

8.1 Industry Optional Prompts

Selecting the type of merchant industry will allow for different prompts to be used. The prompts for Clerk, Invoice, Tax and Tip are optional.

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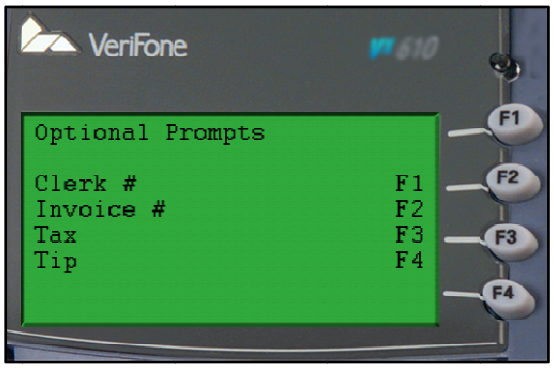
This section also allows you to select text for the Clerk # and Invoice# prompts.



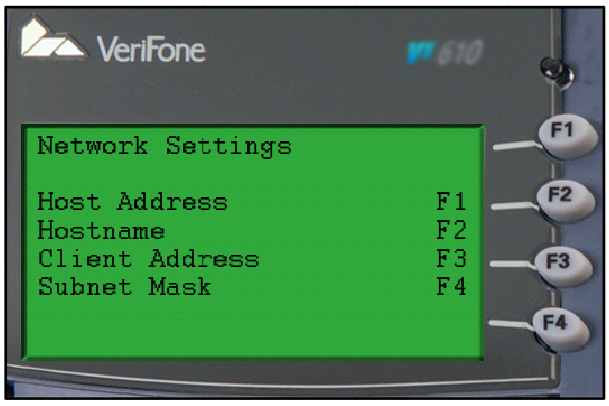
8.1.1 Press down then F1 for Setup.
8.1.2 Press F2 for Optional Prompts.
8.1.3 Press the number next to the Clerk # prompt to enable this option.
8.1.4 Press F2 to turn on and F3 to select the text for Clerk #.
8.1.5 Select the number next to the Invoice # prompt to enable this option.
8.1.6 Press F2 to turn on and F3 to select the text for Invoice #.
8.1.7 Select the number next to the Tax prompt to enable this option.
8.1.8 Press F2 to turn on and F3 to enter the amount for tax percentage, if applicable.

8.2 Connect Options.

Use this section to adjust how your terminal will connect to the gateway. You will be able to switch between wireless/wired only or let the terminal decide which the best is for any given transaction.

8.3 Network Settings

The host address for your network can be inserted or edited using this setting.



8.4 Phone Settings

Use this section to change the dial out options. You will be able to set the dial type, prefix, and number to dial.

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8.5 Receipt

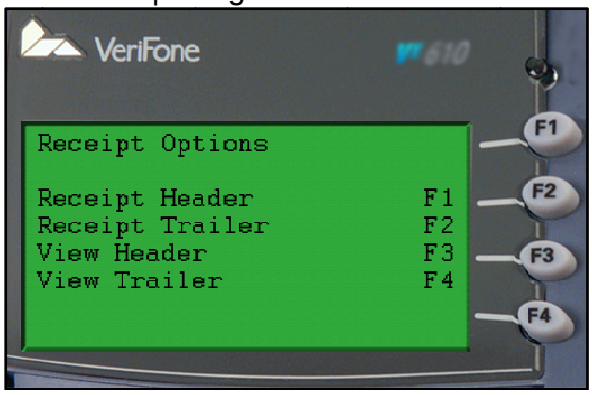
The header and the footer of the receipt may be customized.

8.5.1 Press down then F1 for Setup.

8.5.2 Press down then F2 for Receipt Options.

8.5.3 Press Header or Trailer.

8.5.4 Select the line using the F key and then press F3 to modify the line. Line 1: Enter Line 1 as it should appear on the receipt E.g. *Company Name* Line 2: Enter Line2, as it should appear on the receipt E.g. *Company Address* Line 3: Enter Line 3 as it should appear on the receipt E.g. *Company City* Line 4: Enter Line 4 as it should appear on the receipt E.g. *Company Phone Number* Line 5: Enter Line 5 as it should appear on the receipt E.g. *Welcome to Our Company.*



8.6 Offline

Use this section to switch Offline mode on and off. If Offline mode is set to off, then the terminal will be able to connect live to the gateway. If it is set to on, then the Offline mode will be active.

8.7 View All Settings

This feature allows you to print the settings that the administrator has set for the device. All Settings displays Device Settings, Optional Prompt Settings, Fraud Control Settings, Security Settings, Receipt Settings, and Network Settings.

9 SECURITY

9.1 Security Options

9.1.1 Press down then F2 for Security.

9.1.2 Enter Manager Password.

The Fields for Fraud Control, Transaction Security, Password Options, and Halo will display.

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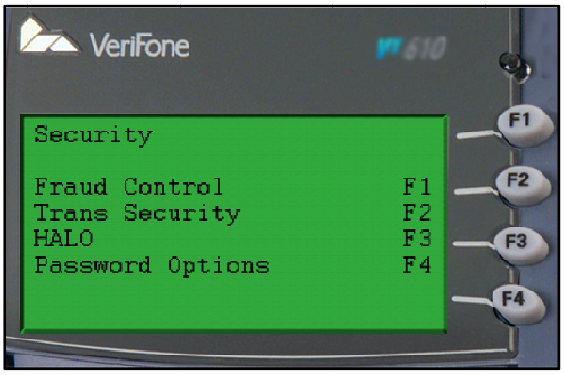
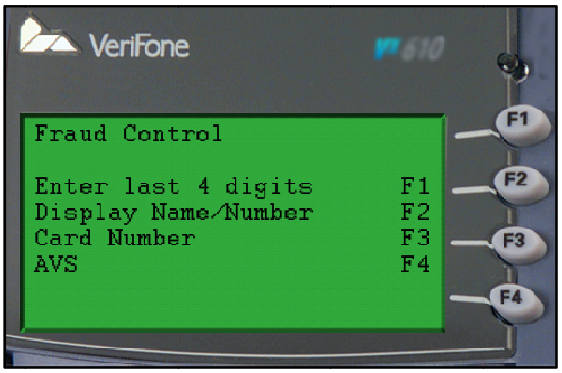


9.2 Fraud Control

Press F1 for Fraud Control.



9.2.1 Press F1 for Enter Last 4 Digits. This will require you to enter the last 4 digits of the card every time it is swiped.

9.2.2 Press F2 for Disp. Name/Card#. The default value is on. This will display the information from the card swipe.

9.2.3 Press F3 for Card Present Option. Will ask if card is present for transactions and allow you to set optional security controls if card is not present.

9.2.4 Press F4 for AVS Options. This setting will allow you to enter the Address and Zip Code of the customer.

9.2.5 Press down then F1 for CVV Options. This will allow you to enter the CVV/CVC number if the card # is entered manually.

9.2.6 Press down then F2 for Truncation. The default value for truncation is "All Copies". Merchant has the option to change to Customer Copy Only in the event that he must to retrieve full PAN. In this case, Merchant must ensure that he implements physical security measures to protect the receipt on which full PAN is printed.

9.3 Transaction Security

9.3.1 Press F2 for Transaction Security. The device screen will display: Sale, Auth Only, Force, Return, Void, and Retry.

9.3.2 Change item to On to enter password before conducting a transaction.

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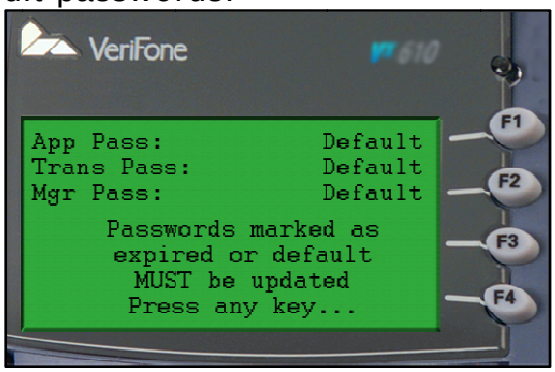
9.4 Password Options

Passwords are implemented at various access levels to maintain the security of the application. Only those who have manager level permissions may edit passwords.

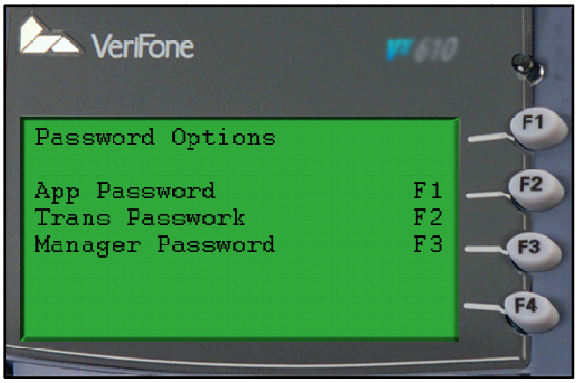


The passwords will remain the default until personalized. All default and expired passwords must be changed to maintain security. The passwords must adhere to the password policy. By selecting Suggest Password, the device will generate a random password that meets the requirements. You must then remember the password to enter it into the change password screens. It is not automatically done. (See FAQ: Password Policy)

9.4.1 To set the Application Password, press down then F2 for Security.

9.4.2 Press F4 for Password Options.

9.4.3 Press Manager Password, Transaction Password, or Application Password.



9.4.4 Press F3 to enter the new Password.

9.4.5 Confirm the new Password.

9.4.6 Press **Save** to change the password.

9.5 HALO

HALO allows you to enter an upper dollar amount beyond which a sale and or a return may not be processed.

9.5.1 Press down then F2 for Security.

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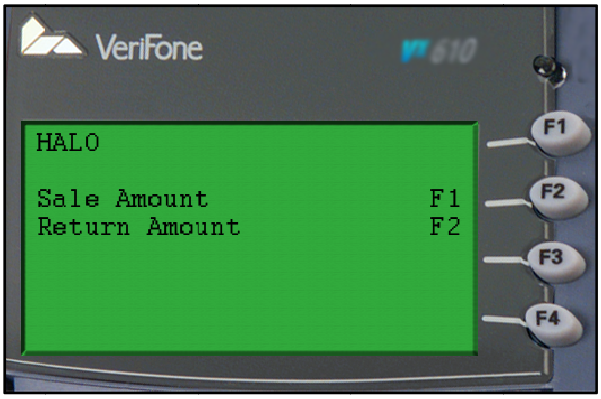
9.5.2 Press F3 for HALO.
9.5.3 Enter Sale Amount.
9.5.4 Enter Return Amount.
9.5.5 Press Enter.



NOTE: A password is required to access or modify any security features.

10 SUPPORT

10.1 Help Desk Info

10.1.1 Card Processing Help
Enter the Name and Number that the user can call for Card Processing Help.
10.1.2 Terminal help
Enter the Name and Number that the user can call for Terminal Help.

10.2 Card Type Info

The numbers for the supported card types that the user may call for Card Type Information.
10.2.1 Visa MasterCard – 800 944-1111
10.2.2 American – 800 528-2121
10.2.3 Discover – 800 347-1111
10.2.4 Diners Club – 800 525-9040

10.3 FAQ

At this time the FAQ contains several answers to FAQs.

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11 MAINTENANCE

11.1 Rotate Logs

Press to rotate logs. Logs are maintained for 3 calendar days. Logs are rotated to Archive1, Archive2 or Archive3. NOTE: To purge, rotate the logs several times.

11.2 Rotate Keys

Press to rotate keys.
NOTE: Rotate keys periodically to maintain security.

11.3 Unregister

Press to unregister the device. Device will automatically reboot.
NOTE: Once unregistered, a license number and phone number will be needed to register the device.

12 EXIT

12.1 Power Off

To turn off the power, press and hold the red button. The power cord must be fully removed in order to have a complete power off. The battery power status is shown at the bottom of the opening screen when the power cord is plugged in.

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